



# Volunteer Roles & Responsibilities

SHIBA HelpLine is not only a way to provide people with free, trained, impartial health insurance counseling—it's also a satisfying volunteer opportunity.

SHIBA offers volunteers many **choices**—different ways to contribute to the community and assist folks with all kinds of health insurance questions and problems.

In addition to basic qualifications which all volunteers must fulfill, there are specific capacities in which a volunteer can serve, depending on his or her skills, interests, talents and experience.  
*See inside for a list of specific roles.*

## BASIC VOLUNTEER REQUIREMENTS

*To be an active SHIBA HelpLine volunteer, an individual must:*

- complete a minimum 30 hours of basic training and mentoring curriculum (hours may be reduced for administrative or clerical volunteers)
- attend regularly-scheduled in-service training sessions (generally one session a month, nine months a year)
- attend specially-scheduled training sessions when necessary
- miss no more than two training sessions within a year (more than two absences must be specifically excused by the SHIBA trainer, and make-up sessions must be arranged)
- NOT be affiliated with (i.e., licensed, employed by or in a position to sell) any insurance company, agency, product or service
- make a minimum one-year commitment
- be willing to assure confidentiality to all clients
- be willing to complete necessary paperwork in a timely manner
- actively participate in the basic SHIBA HelpLine mission—education, advocacy and assistance—on a regular basis

*Also helpful are:*

- An interest in insurance and/or health care issues
- A desire to contribute to the community and the lives of others
- The ability to communicate clearly
- Compassion, sensitivity and understanding

See inside for description of BASIC volunteer roles and SPECIALTY advisor roles.

## SHIBA HelpLine Volunteer

# BASIC ROLES

### **TO EDUCATE:**

- by distributing SHIBA HelpLine materials in the local community
- by staffing information booths at retirement and health fairs and community events
- by showing videos and answering questions at community group meetings
- as a member of the SHIBA HelpLine Speakers' Bureau, speaking on
  1. Basic Health Plan and the individual market
  2. Medicare (including QMB/SLMB)
  3. Fraud and Abuse
  4. Long Term Care
- As a subject expert on insurance topics such as: COBRA, employment-related plans, state or federal retiree plans, military and veterans benefits, Medicaid, etc.
- the community about the role of SHIBA HelpLine volunteers and volunteer opportunities

### **TO ASSIST CONSUMERS**

- as a classic one-to-one counselor
- as a specialty one-to-one counselor (topic descriptions on next two pages)
- as a medical billing specialist

### **TO ASSIST OTHER SHIBA VOLUNTEERS**

- as the local unit expert on a specialty topic (topic descriptions on next two pages)
- as an Internet researcher/computer specialist
- as an administrative assistant for the local unit
- as a back-up telephone counselor for units in other counties statewide

### **TO ADVOCATE FOR INDIVIDUALS**

- as a fraud and abuse specialist
- as a disability specialist
- as an advocacy/appeals specialist

### **TO ADVOCATE FOR LOCAL COMMUNITIES**

- as a multicultural liaison/ESL specialist
- as a disability or disease group specialist
- as a veterans' assistance specialist
- as a low-income insurance specialist
- as a rural health care specialist

**V**olunteers who wish to receive additional training (besides Basic Training) in an area of expertise, such as one of those listed at left, can ask their trainers about **specialty advisor roles**. These roles are described in more detail on the next two pages.

# SHIBA HelpLine Volunteer Roles

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## **“CLASSIC” ONE-TO-ONE COUNSELOR**

The volunteer serving in this “classic” role counsels consumers one-on-one (either in person, or by phone if the question is simple). Every volunteer is trained to deal with a wide range of basic issues related to all kinds of health insurance: individual, employer-related, managed care, Medicare, Medigap, long-term care, and more. Clients may need help assessing coverage needs; comparing policies; understanding forms, bills or payments; finding providers or facilities; or many other issues.

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## **SPECIALTY ONE-TO-ONE COUNSELOR**

Volunteers serving as “classic” one-on-one advisors (above) are trained to answer frequently-asked questions and help with the most common problems. However, because the health insurance landscape is shifting constantly and quickly, some areas of growing concern require more in-depth training. A volunteer may choose to become a local Specialty Advisor in topics such as: Employment-Related Plans, Professional Groups (e.g., retired teachers, military), Disease Groups (e.g., AIDS, fibromyalgia), Pre-retirees and Retirees/Medicare & Medigap, Long-Term Care, Medicaid, Low-Income, Rural Access, Veterans, or others. A counselor may even specialize in one type of insurance on the individual market--i.e., Basic Health Plan, self-funded plans, COBRA issues, or others. Experts are always needed to solve specific problems.

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## **DISABILITY SPECIALIST**

This volunteer has skills and training specifically to assist and advocate for those with disabilities. The volunteer in this role will be trained in-depth on health insurance options and issues for the disabled; and may or may not also have personal experience with the type(s) of disabilities targeted.

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## **FRAUD & ABUSE SPECIALIST**

This volunteer is trained to detect, report, and follow up on suspected health insurance fraud and abuse. These specialists may be assigned special cases with responsibility for follow-through, contacts, and coordination; and/or help educate consumers and communities about how to detect and report fraud and abuse.

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## **COMMUNITY EDUCATOR/PUBLIC SPEAKER**

A volunteer in this capacity uses public speaking abilities and social skills to present basic information about the SHIBA HelpLine, or about specific health/insurance topics, to community associations, clubs, agencies, and other groups. If desired, a volunteer may request to be a speaker only on a specific topic, such as one of those listed in the previous section.

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## **VOLUNTEER RECRUITMENT SPECIALIST**

Volunteers can use public speaking abilities and social skills to introduce SHIBA HelpLine and its mission to prospective volunteers; target their peers and those representative of local populations and help them to understand both the benefits and challenges of working with the SHIBA HelpLine; support individuals or groups through the application and orientation process and procedures; and assist in the mentoring program.

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### **ADVOCACY/APPEALS EXPERT**

This volunteer role is suited to the “go-getter” assertive personality. It involves supporting and advocating for consumers whose rights may have been violated, or who have received treatment that is “technically” legal but practically unfair. It may involve phone calls, letters, or personal attendance at hearings and appeals procedures on behalf of the client and SHIBA HelpLine. Volunteers produce results such as getting clients’ insurance reinstated, obtaining coverage for procedures or treatments initially denied, or obtaining payment due the client.

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### **MULTICULTURAL LIAISON / ESL (ENGLISH AS A SECOND LANGUAGE) SPECIALIST**

This volunteer helps the local unit become more culturally competent, and/or represents and serves different cultures. He or she may identify underserved populations locally (community assessment), connect with people for whom English is a second language (ESL); use language skills to translate information; promote SHIBA HelpLine to groups with whom they have cultural ties; and help other volunteers develop these skills.

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### **ADMINISTRATIVE ASSISTANT**

This volunteer assists the local Coordinator (the volunteer responsible for SHIBA activity at each sponsoring agency) with on-site management. Work may include data entry, recordkeeping, reporting, planning and other organizational tasks. The assistant may schedule meetings, trainings and community events; prepare mailings; tabulate reports, distribute materials, monitor attendance, or provide computer expertise.

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### **MEDICAL BILLINGS/FORMS SPECIALIST**

Many people are confused and overwhelmed by the flurry of paper generated by some kinds of health insurance and government programs. This volunteer helps people sort out and efficiently manage health insurance paperwork, and complete insurance-related medical forms, bills, and other paperwork properly and on time.

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### **INTERNET RESEARCHER/COMPUTER SPECIALIST**

More and more SHIBA HelpLine (and other agencies’) materials and information are available electronically. This specialist uses computer/web skills and experience to investigate and report on Internet resources, news, and information that could be helpful either to consumers or to our volunteers and staff. Computer-literate volunteers can also assist and train other volunteers; and support consumers in taking advantage of on-line resources.

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Trainers are always willing to hear and consider volunteers’ own ideas about additional ways to help. SHIBA HelpLine trainers and program coordinators also may have other special opportunities for advanced training and roles.